New Chair Guide

Community Resource Coordination Groups of Texas

Updated 2018

Original Version 2000

Acknowledgements

Preface

As used in the Guide, "CRCG" (Community Resource Coordination Group) refers to CRCGs for Children and Youth, CRCGs for Adults, and CRCGs for All Ages.

"To lead people, walk beside them…

As for the best leaders, the people do not notice their existence. The next best, the people honor and praise.
The next, the people fear;
And the next the people hate…

When the best leader's work is done, the people say,
'We did it ourselves.'"

Lao Tzu

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Introduction: A Message to the Chair

"Only a life lived in service to others is worth living."
Albert Einstein

Welcome and *thank you* for your willingness to lead the Community Resource Coordination Group in your community. Your leadership in supporting the state's interagency process of coordinating resources is vital to helping Texans who might be struggling and/or are in crisis. While this promises to be a challenging effort, many find it to be personally rewarding as your community's CRCG can impact individuals and families in significant, meaningful ways.

This Guide is intended to provide ideas, helpful hints, and suggestions to help you succeed in your role as Chair. This Guide does not have all the answers; we encourage you to seek guidance through the State CRCG Office and your counterparts throughout the state. You will create and define your role as Chair utilizing available resources in your community and in close collaboration with local partners who are essential to your CRCG's success. We hope this Guide will assist you on this journey.

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"This project is extremely important, but it has no budget, no guidelines, no support staff and it's due tomorrow morning. At last, here's your chance to really impress everyone!"

The Guide includes three sections: The Meeting; Leadership; and Problem Solving. Setting up and running the CRCG meeting is a primary activity and responsibility of the Chair. The first section, The Meeting, provides practical advice for preparing for and facilitating a CRCG meeting.

The second section addresses Leadership. Effective leadership is the key to harnessing the collective power of community partners and ensuring the

success of the CRCG. You are in this position for the dedication and skilled leadership you bring.

The third section, Problem Solving, addresses some of the challenges CRCGs have encountered and offers suggestions for solving these difficulties.

This Guide is a reference tool. While it can be read sequentially cover to cover, you can access specific sections of the Guide to obtain needed information.

Additional resource information, tools, suggestions, and ideas can be found on the website at https://crcg.hhs.texas.gov or by calling the State CRCG Office at (512) 206-5255. We are here to help you!

Selecting a CRCG Chair

The selection of a Chairperson is among the most important tasks a CRCG undertakes. Team leadership is crucial to the success of the CRCG process. As the leader, you commit time, skills, and energy coordinating both CRCG members and vital resources in a collaborative process to help people with complex needs.

Defining the Selection Process

Each CRCG creates their own process for leadership selection. Some CRCGs schedule annual elections and elect their leader(s) at a specified monthly meeting each year. Others rotate the Chair among agency members every year. Still others treat the Co-Chair or Vice Chair as a Chair-Elect who assumes the role of the Chair the following year. Some CRCGs have the same Chairperson for as long as they choose. In this case, the State CRCG Office recommends an annual election to reaffirm the continuing support of the group.

Finding the Right Chairperson

The Chairperson should be a seasoned member of the CRCG. Members should carefully consider whom they elect. One method is to ask for volunteers. Another is to seek nominations. The CRCG may identify the qualities they would find helpful in a Chairperson, then ask a nominating committee to make recommendations. The full CRCG elects the Chair from the pool of nominated individuals.

Length of Term

The CRCG Guiding Principles recommends that the terms for the officers be re-evaluated annually. The CRCG will need to determine if a Chair can be re-elected.

Some CRCGs are structured with bylaws or guidelines that include rules for electing officers. As a result, an annual election process might or might not be pertinent to the election of a new Chairperson.

The Meeting

"A spirit of fun should pervade every meeting because it helps people participate and learn."
Gene Perret

The meeting is the central activity of the CRCG where coordinated individual service plans (ISPs) are developed for people and families with complex needs. In some cases, ISPs are developed through emergency staffings. At these meetings individuals and families entrust their stories to CRCG members, and referring entities seek the support of colleagues. During the staffing, CRCG members identify a lead entity, commit to providing services and coordinating their efforts, and commit to collaboration in serving the individual or family through the implementation of the ISP.

The CRCG meeting is also the place to address administrative tasks, conduct follow-up on previous ISPs, and assess larger community needs. For example, establishing or modifying operating procedures and policies, welcoming new members, and addressing systemic challenges identified through the development of ISPs.

One of the Chair's key roles is to ensure that the CRCG's meetings are effective and efficient. This requires:

- Carefully preparing for the meeting.
- Developing a working agenda.
- Managing the meeting effectively.
- Developing ISPs that support the needs of the individuals/families.
- Reflecting on the strengths and weaknesses of each meeting.

Preparing for the Meeting

Most of the work required for effective meetings occurs before the meeting takes place.

Prepare the Agenda

First, prepare an agenda. A well thought out, carefully constructed agenda will help ensure that the meeting runs smoothly and accomplishes its goals.

The State CRCG Office recommends developing a standard agenda by consensus. The standard agenda will lay out the items to be addressed at

each meeting and the order in which they will be addressed. A standard agenda also simplifies the process of preparing for meetings. Chairs may "fill in the blanks" for each meeting. Revisit the agenda occasionally to be sure it continues to meet the needs of the CRCG, its members, and, especially, the individuals and families that it serves.

Below is a sample agenda. The times are suggested and may or may not be included on the distributed version. It might be helpful for the Chair to estimate the time needed for each item to keep the meeting on task. Some CRCGs establish time limits for each agenda item and appoint a timekeeper for this purpose.

Sample CRCG Meeting Agenda

Mission: To create service plans through interagency collaboration for children and families whose needs cannot be met by a single agency.

I. Introductions and announcements (20 minutes)
II. Agenda Review
III. CRCG business meeting (30 minutes)
    a. Minutes
    b. Other items of discussion (operating procedures, funding, systems change, increasing public awareness of the CRCG, recruiting new members, etc.)
IV. Staffings: Individual Service Plans ISPs (30 minutes each)
V. Follow-up Reports (30 minutes)
    a. One Month
    b. Three Months
    c. Six Months
    d. One Year
VI. Presentation (30 minutes)
VII. Adjourn (10 minutes)

You will need specific start times for each of the staffings as a courtesy to the family or individual and to others attending that part of the meeting.

Some CRCGs include an educational presentation as part of their monthly meeting. Some include it only if the number of ISPs scheduled permit the time. Suggestions for the educational presentation include:

- A presentation on a program offered by a member agency.

- A program presentation by a non-member agency.
- A guest sharing a new community initiative.
- A presentation on interagency collaboration by an invited guest, etc.

All CRCG members should be afforded the opportunity to provide input into the development of the agenda. To ensure members have sufficient opportunity to provide input, use the following approaches:

- Ask for agenda items for the next meeting at the conclusion of the current meeting.
- Keep an open invitation to members to suggest agenda items until a specified date before the next meeting.
- Have an agenda committee prepare each month's agenda.
- Review the agenda at the beginning of each meeting and provide the opportunity to amend the agenda.

Determine Staffing Eligibility

The State CRCG Office recommends each CRCG develop a process to screen eligibility of referred people and families. Screening is done by the Chair, another member of the leadership team, or an established screening committee. The State CRCG Office developed the Referral Eligibility Chart to determine eligibility. The Referral Eligibility Chart is available on the CRCG [Website](). During a screening:

- Determine whether the referral is appropriate.
- See that the information needed is complete and comprehensible.
- Ensure that any release of information was executed by the individual/family or the individual's/family's representative.
- Identify who will be important in developing the ISP.

Individuals and families who are appropriate for a CRCG staffing are also placed on the agenda.

Notify Members

Member participation is crucial to the success of the CRCG. Routinely notifying members of the next meeting can increase participation, even if the meeting is regularly scheduled each month.

Meeting notices can be provided by e-mail, phone, or mail. For example, notify members in writing a week before, and follow-up with a phone call a day or two before the meeting. Notifying members can be the responsibility

of any member. Special attention should be given to encouraging the attendance of organizations that might be able to contribute to the ISP.

Some CRCGs encourage member organizations to appoint "alternates" to attend the CRCG meetings when the regular member will be absent. Members should be strongly encouraged to call if they must be absent from a meeting.

Invite Others

The State CRCG Office recommends extending invitations to non-members of the CRCG who might have something to contribute to a particular ISP.

Prepare Materials

Prepare and assemble all materials prior to the meeting. These may include but are not limited to:

- Minutes of the previous meeting
- Sign in sheets
- Individual or family information packets
- Confidentiality forms
- Evaluations
- Name tags or name tents
- Easel pads

These tasks can be assumed by the Chair or delegated to another member.

Managing the Meeting

Effectively managing meetings is another key to the success of the CRCG. Effectively managed meetings will:

- Help maintain active attendance and participation of the members.
- Ensure that important items are brought to resolution.
- Ensure that all participants are clear about expectations.
- Help everyone leave with a sense of accomplishment and time well spent.

Essential elements of a well-managed meeting include keeping the meeting moving and on subject, the orderly discussion of issues, and firm consensus on resolution of issues.

Set Ground Rules

Clear, agreed upon ground rules are an effective meeting management tool. Ground rules should be developed and agreed to by all CRCG members, written down, and be prominently posted at each meeting.

Below are sample ground rules:

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Sample Ground Rules

1. Meetings will start and end on time.
2. Avoid personal attacks and the use of labels.
3. Listen with understanding to what others have to say.
4. Avoid "side bar" conversations.
5. Encourage everyone to participate.
6. Monitor your own "air time."
7. Don't interrupt.
8. Stay on subject; stick to the agenda.
9. Be concise, don't repeat others.

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Keep Time

The Chair is responsible for keeping time at the CRCG meeting including starting on time, moving between agenda items, and closing on time.
To start the meeting on time, follow some of these suggestions:

- Arrive at least 30 minutes prior to the start of the meeting. Be sure the meeting room is set up well before the scheduled start time.

- Establish a strong expectation that meetings will start on time. This can be accomplished by starting at the appointed time regardless of who is present.

- Ask members to call you the day before the meeting if they will be late.

- Have a 30-minute informal networking time prior to the meeting with snacks. Encourage members to come early to meet each other. Members may take turns bringing the snacks.

- If a particular member is consistently late, meet with the member one-on-one to discuss your concerns and discover ways to assist the member to be timelier.

- If lateness to the meeting is a consistent problem with multiple members of the group, put it on the agenda for discussion and have members develop a plan to solve the problem.

To move the meeting forward, follow some of these suggestions:

- Start by having an idea of the time required for each agenda item.

- Be clear about the goals of each agenda item: Is it just for discussion or is a formal discussion needed?

- Bring discussion items requiring a conclusion to a close.

- Move discussion items that cannot be resolved to a future meeting, or assign to a committee for further discussion.

Ending the meeting on time is important and respectful of others. Members schedule their day around the CRCG meeting and generally have appointments or assignments needing their attention after the meeting.
To close a meeting on time, follow some of these suggestions:

- Start on time.

- Determine which agenda items are most important and are most urgent prior to the meeting.

- Cut or defer agenda items until the next meeting if the meeting is running late.

Consider appointing a timekeeper if maintaining time is a challenge for the CRCG. This practice should be agreed upon by the entire CRCG. The timekeeper should be given specific instructions such as "give a five minute and one minute warning as the end time for an item approaches."

One of the quickest ways to impede participation in a CRCG meeting is to start late, end late, and get hung up on one or two items on the agenda. Poorly managed meetings with inconsistent start times discourage attendance, timeliness, and productivity.

Guide the Discussion

Guiding a discussion means keeping it on subject, minimizing repetition of points already made, and moving the discussion toward closure. One of the dangers to clear and focused discussions is going off topic. This happens when a member raises an unrelated point. Another member may follow up with a comment further from the topic of discussion. The Chair is responsible for tactfully bringing the discussion back on topic. Some approaches to consider are:

- Maintain a "parking lot" to save ideas for future discussion. When the conversation goes off topic, use language such as "You know, that's a great idea, but I think we should pick back up on what Maria is saying. Can we put this in the "parking lot" and come back to it later?"

  Visit the parking lot before the end of the meeting and decide what to do with the items there. Items may be discussed at the time, assigned to a committee or may be placed on the agenda for the next meeting. The members may decide to drop it or to refer it to another group.

- Get the help of the members. Discuss the problem of going off topic. Ask the members to signify, in some agreed upon manner, when the group goes off topic.

Repeating the same point can bog down a discussion. To free the group from repeating the same point, consider using the following cues:

- "As I understand it, the point you are making is…. Is that correct? Is there anything else you want to add?"

- "Does anyone have something different they want to add to the discussion?"

- "Are there others who would like to support this point? Perhaps those in support could raise their hands and we'll note it and move on to the next point."

To move the discussion toward closure, have the end point in mind. Some things to consider are:

- Is action required by the CRCG or is this an informational discussion?

- If it is informational, ask if there are one or two final points to be made. Ask a discussion leader for summation.

- If it is an action item, ask if someone would offer a tentative consensus.

- If there is no agreement, ask someone not in agreement to state his/her concerns or offer an alternative. This process continues until a consensus statement is offered that all can live with.

- If no consensus can be reached in the allotted time, you may ask the group as a whole how to proceed. Continue the discussion but drop the other agenda items? Ask a committee to bring a recommendation back to the next meeting? Defer further discussion to the next meeting?

Clarify Consensus

It is important all the members understand the decision that was made through consensus. Sometimes, members might have different opinions about the decision. To address this, the Chair states the consensus and asks if all concur. The Secretary records the consensus as stated.

Develop the Individual Service Plan

The development of the ISP is the core activity of the CRCG. The Chair must ensure that the individual or family is informed about the ISP process. The Chair must also ensure that the individual or family members sign all appropriate consent forms.

Providing structure and effective management of the staffing will help ensure that:

- A comprehensive coordinated ISP is developed.
- The individual or family is engaged and respected in the process.
- Commitments are clear.
- Expectations are well understood.
- Follow-up is conducted.

Below is a sample agenda for a staffing to develop an ISP:

> **Staffing agenda to develop an Individual Service Plan:**
>
> 1. Welcome individual/family and representatives.
> 2. CRCG member introductions.
> 3. Individual, family, service coordinator, caregiver or family member presentation.
> 4. Interview by CRCG members (needs and strengths).
> 5. Prioritization of critical needs.
> 6. Build the ISP.
> 7. Summarize and approve the plan and approved
>
> (Repeated for each individual/family)

Welcome - Individual or Family Introductions

Creating a welcoming environment and facilitating introductions set the tone for the CRCG meeting and staffings. Introductions should make the referred person or family and other guests feel welcome and comfortable.
First, the Chair should warmly welcome the individual, family, and any people accompanying the individual or family. Next, the referring member should introduce the individual or family being staffed and any other guests, including caregivers.

CRCG Member Introduction

Finally, the members should welcome the individual or family and introduce themselves by saying their name and the agency or organization that they represent.

The Chair should then explain to the individual or family how the meeting will work and what to expect.

Individual, Family, Service Coordinator, Caregiver(s) or Family Member Presentation

Invite the individual, family, or caregiver(s) to briefly tell their story and state what they want from the CRCG. If the individual or family is not comfortable doing this, the service coordinator, case manager, or referring entity may do this on the individual's or family's behalf with their consent. This should be pre-arranged by the referring agency and confirmed in advance by the Chair to avoid any discomfort.

Following the individual's or family's opening statement, the Chair summarizes what the individual or family is requesting and asks for verification of understanding.

For example, "As I understand it, you would like our help in getting computer training, finding a job, and arranging transportation to get you to and from work. You would also like help getting child support for your children and finding a better place to live. Did I get it right? Is there anything I missed? Is there anything else you need? Would you like to add anything?"

Interview by CRCG Members

Next, the Chair invites members to participate in the interview to clarify needs and identify strengths. To transition to the interview, the Chair could say something to the individual or family like, "Thank you for sharing your story and describing your needs for the team."
We also want to learn more about your challenges, interests, and your strengths. This conversation will help us to develop a meaningful plan together today."

Members may respectfully ask questions of the individual, family, or caregiver(s) to increase their understanding of the individual or family's circumstances.

Clarify Strengths

The CRCG should build the ISP around the strengths of the individual or family rather than focusing on perceived deficits or judgements. This includes both the personal strengths of the individual or family and the strengths of their friends, their community and/or their faith community. This interview process will reveal strengths of the individual, family, or caregiver(s) that the CRCG can build upon.

The interview should include questions that intentionally identify strengths and interests of the family or individual. Questions should be specific to each person to help inform the ISP. Asking questions to elicit strengths also engages the individual or family and motivates participation in ISP planning.

If the individual or family does not what to answer a question, do not coerce a response. The chair may say something like, "We can move on and come back to that later if you want, let's see if we have any other questions…"

It might be necessary to ask a few questions, or several questions, depending on the staffing situation and the individual or family.

Examples of questions that you might want to ask:

> "Strengthen me by sympathizing with my strength, not my weakness."
>
> *Amos Bronson Alcott*

- What is the most important thing you have ever done?
- When are you happiest?
- What are your best qualities?
- What are some activities you enjoy?
- Are there any special values or beliefs that are important to you?
- Who do you call on when you need something?
- Who calls on you when they need something?
- In your day to day life, what do you consider to be some of your greatest strengths?
- Tell us about your career (and/or major life) goals over the next five or ten years?
- Stress exists for everyone who faces challenges. What strategies have worked well for you to cope with stress?

This process will reveal strengths of the individual, family, or caregiver(s) that the CRCG can build upon to enhance planned services.

Prioritization of Needs

Following the opening statement and interview, the Chair summarizes the priority needs. These needs could be abbreviated on a flip chart or white board. The Chair should ask for confirmation of the needs that are the most important to the individual or family.

Develop the ISP

The Chair next engages the team members in a conversation to identify services and supports for the family to address identified needs that build on

the strengths identified in the interview. The CRCG creates the ISP by offering services and supports to meet the needs of the individual or family.

When a service is offered, gather feedback from the individual or family to ensure the service is appropriate and can be delivered in the manner best suited to the client or family. The Chair may suggest services provided by members. The time requirements of the service must be identified. For example:

- When will it start?
- When will it end?
- Can it be extended?
- Are there pre-requisites to begin the service?

The Chair may assign a scribe to write down the services on a flip chart or dry-erase board as they are being offered. This might be a useful visual tool that supports discussion and review of the plan as it is developed. The team may also identify service provider gaps in order to address priority needs.

The Chair may develop a plan for reaching out to other providers after the staffing if priority needs cannot be addressed by attending members. After all the services and resources are identified, the individual or family and the providing entities review the services together and reach agreement on the plan.

Summarize and Approve the Plan

At this point, the Chair summarizes the ISP and affirms that there is agreement when it is reached.

The Chair ensures that there is a method in place to assemble the plan elements into an Individual Service Plan form. The State CRCG Office provides an ISP template or the local CRCG may create their own.

Some CRCGs have all parties sign a written draft of the plan. Each participating entity should leave with a copy of the ISP, including the individual or family.

Generally, one of the contributing entities will emerge as the lead entity. If not, the Chair may ask one of the contributing entities to serve as lead (generally the agency or organization contributing the most services), or

may ask for a volunteer from among the contributing entities. If the individual or family has a case manager or a service coordinator, they should oversee the implementation of the ISP.

The lead entity will maintain communication with other contributing entities to ensure services are provided in a coordinated manner. Release of information agreements must be in place between all participating entities to continue communication. The lead entity will submit the follow-up reports to the CRCG team at prescribed intervals.

The ISP may recommend sending letters to prospective service or resource providers, court officials, stakeholders, or others. The Chair will usually generate these letters on behalf of the CRCG.

Maintain Records

Good record keeping is essential to the CRCG meeting. Each staffing record should include the referral form, the ISP, release of information forms, sign-in sheets, copies of data collection forms, and any information from the individual or family made part of the ISP record. Records containing confidential and personal health information must be handled according to state and federal laws such as the Health Insurance Portability and Accountability Act (HIPAA), as well as your agency's policies.

A CRCG member should be charged with maintaining these records. The Chair should ensure that, no matter who is keeping the records, adequate security measures are in place to maintain confidentiality.

Reflect on the Meeting

Consider adding a few minutes at the end of each meeting to reflect on what went well and what can be improved. Members may identify strengths and weaknesses, and make suggestions for future meetings. The Chair and members may receive vital feedback to improve the CRCG process.

You may consider asking questions such as:

• What worked well today?

- What could we do differently from what we did today to make our interagency service planning process more effective?

Members will be more invested in the meetings if they have the opportunity to help shape them. This will also help maintain active attendance at the meetings.

The Chair thanks the members, family members or individual before they leave the staffing. The chair ends the staffing on a positive note, with everyone having a copy of the ISP, and provides an inspirational parting message.

Leadership

**"Leadership should be born out of the understanding of the
needs of those who would be affected by it."**
Marian Anderson

CRCG members will look to you for direction, guidance, and commitment. Leadership means not only doing what is necessary, but supporting others in their efforts as well. The mantle of leadership can be shared by a leadership team.

The Leadership Team

The CRCG can accomplish more through a leadership team approach than through just a single leader. A CRCG leadership team is typically composed of the Chair, a Co-Chair or Vice-Chair, and a Recorder or Secretary. Each member oversees their own set of responsibilities. The leadership team functions as a unit to accomplish CRCG tasks, provide input to the Chair and guidance to the CRCG.

The Chair has overall responsibility for managing the CRCG, facilitating meetings, and serving as an ad hoc member of all committees. The Chair also serves as the CRCG spokesperson to the general public and to other external audiences and is the liaison to the State CRCG Office.

The Co-Chair provides support and additional leadership to the CRCG. Co-chairs facilitate meetings and can assume roles delegated by the Chair, the Leadership Team, or the CRCG as a whole. These roles may include screening referrals, public speaking on behalf of the CRCG, recruiting members, placing reminder calls to members, etc.

The Secretary or Recorder is responsible for the record keeping. The Secretary keeps a record of the meeting minutes, maintains an accurate and up-to-date membership roster, submits data to the State CRCG Office, sends meeting notices, and sends timely reminders to lead CRCG entities that are responsible for follow-up reports at upcoming meetings.

As CRCGs grow and the volume of CRCG referrals increases, many CRCGs benefit from having a dedicated staff position known as a CRCG Coordinator.

The Coordinator will assume many of the tasks of members from the leadership team.

These might include:

- Screening prospective individuals and families.

- Preparing for meetings, including notifying members and preparing materials.

- Assisting in developing the meeting agenda.

- Drafting minutes.

- Making presentations to build public awareness.

- Assisting the lead CRCG entity with implementation and follow up on the ISPs.

- Preparing data reports for the State Office.

Team Building

Each CRCG is a team working together to help people in its community who are struggling. The stronger the CRCG team, the more effective it will be. The strength of the team grows from the ability of the leader.

> "[Teamwork] is a common struggle for the customers, not separate struggles for power."
>
> *- Peter Scholtes*

A Task Force on Teaming at the Hawaii University Affiliated Program[1] identified the following principles for effective teams:

- A team reflects its collective vision.

- A team promotes empowerment of all members.

- A team demonstrates shared decision making.

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[1] www.cds.hawaii.edu/pacific**all**iance/downloads/doc/EssentialToolkit.doc

- A team demonstrates synergy (the whole is more than the sum of its parts.)

- A team highly regards diversity.

- A team fosters the inclusion of people affected by its actions.

- A team fosters self-determination and growth both in itself and individual team members.

- A team operates in an interdependent and reciprocal fashion with related teams and the larger system. There is a real web of connectedness.

- A team reflects a fluid and dynamic quality.

- Build or strengthen your CRCG team by hosting a strategic planning day or a retreat. Pick a different meeting location from the usual gathering place, secure a neutral facilitator, and dress casually to address questions such as, "How can our CRCG be the best we can be?"

Trust

Trust is a key factor of a healthy team. Chairs can support and build trust through:

- Open and honest communications.

- A track record of following through on commitments.

- Share credit generously.

- Treat members respectfully in private as well as in public.

Vision

"The very essence of leadership is that you have to have a vision."
Theodore Hesburgh

A collective vision is the first principle of an effective team. To build a vision for the CRCG, start by articulating the accomplishments of the CRCG for the

people it serves, for its members, and for its community. The vision should include the CRCG as an interagency collaboration that solves the most difficult challenges facing social service systems.

Discuss the vision with your team and build a consensus vision for your CRCG. Express your vision frequently at the CRCG meetings and share the vision with the community as often and in as many ways as possible. Some suggestions include:

- Write the vision at the top of the agenda.

- Post the vision on the wall at each meeting.

- Read the vision at the beginning of each meeting.

Member Empowerment

The second principle of an effective team is one that empowers its members. An empowered member has the ability to be heard, to influence outcomes, and the ability to contribute information.

Empower members by sharing responsibilities and ensuring that all members are able to participate equally. Empowered members will strengthen the CRCG with increased rates of attendance, participation, and productivity.

Recruiting Participants

The CRCG includes representatives from state agencies, representatives from local government agencies, private providers, individuals, families, caregivers, and family members as directed by legislation and the CRCG Memorandum of Understanding (MOU).

If any of these groups are not adequately represented, recruit new members. Representatives from state agencies will vary by agency and program. For example, representatives from the Health and Human Services Commission will include Local Mental Health Authority (LMHA) staff since the LMHA is HHSC's local service provider mental health services. It will also include and Medicaid enrollment staff who provide access to state benefits such as Medicaid, Supplemental Nutrition Assistance Program (SNAP) and Temporary Assistance to Needy Families (TANF).

The Texas Department of Family and Protective Services representation will be Child or Adult Protective Services supervisors, managers, or regional directors. For more guidance on agency representation, contact a neighboring CRCG or the State CRCG Office for recommendations.

Look to CRCG members for existing connections to possible new agency representation. Have them contact their connections to determine the best representative or have a representative appointed to the CRCG. Follow up with that person and provide a thorough review of the CRCG program, the benefits to the agency for participating, and the requirements of the MOU. Invite them to the next CRCG meeting.

For private sector and local agency representatives, conduct a brainstorm session with the CRCG to identify potential members. You can:

- Assign members to call or meet with each prospect.

- Invite them to an orientation meeting.

- Ask prospective members to make a presentation about their programs at CRCG meetings.

- Give a CRCG presentation at a local interagency meeting.

In selecting private, local government, consumer/caregiver, and parent/family representatives, consider the demographic and service population diversity of the CRCG. A clarifying question you might want to ask is, "Is our CRCG culturally representative of the county(s) we serve?"

To recruit caregivers or family and parent representatives, consider asking each member to suggest one or two people and to provide a brief biography of each. A nominating committee can review the prospects, meet with the each person, and make recommendations to the entire CRCG.

Orientation

The Chair or leadership team helps new members become full participants by providing an orientation prior to the first meeting. The orientation should include the CRCG history, vision, activities of the CRCG, and member expectations.

Orientation can be a formal training involving other members of the CRCG, or an informal meeting between the Chair and the new member, perhaps over lunch.

Listen

Being heard is key to feeling part of a group. Ensure that every member has the opportunity to be heard by creating space and opportunities for them to speak. Enforce respectful, active listening as a cultural norm.

"Could you at least listen to my idea before you shoot it down?"

Respectful, active listening means receiving information without judgement. Judgement builds a wall between the speaker and the listener and inhibits future sharing of ideas and opinions.

As Chair, elicit participation from all CRCG members including those who are reluctant to speak, then affirm the contributions they make.

Engage

Effective CRCG membership requires full engagement in the CRCG. Engagement means committing one's time, energy, talents, and agency resources to the ISP and CRCG.

The Chair facilitates member engagement. Get to know each member and provide opportunities for the member to contribute. Assist the member by educating their superior, if needed, and acknowledge their contributions and those of the member's organization or agency.

Delegate

Often leaders are tempted to do everything to make sure it is done right, to avoid the time and effort required to equip others to take on the tasks, or to

avoid asking others to take on another job. Failing to share the workload with fellow team members, impedes the progress of the CRCG because:

- There is only so much of you to go around, so some things that could be done, won't be.

- Member involvement will wane as they will not see their involvement as important.

- The emergence of new leadership will be stunted as opportunities to practice leadership won't exist.

Leaders that do not delegate greatly increase their risk of burn out (psychological stress characterized by exhaustion), a lack of enthusiasm, feelings of ineffectiveness, frustration, or negativity.

To delegate effectively, identify all the Chair's tasks. Then, eliminate all the tasks that must be done by the Chair such as facilitating the meetings. The remaining tasks should be able to be done with little or no support from you. These are the easiest to delegate.

Next, develop a list of all the things you would like the CRCG to do but haven't had time to initiate. Again, decide which must be done by the Chair and which may be done by a member or committee.
At a CRCG meeting, present your list and welcome additional items. Have the team decide how best to assign the tasks.

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"My team has created a very innovative solution, but we're still looking for a problem to go with it."

Committees or Task Forces: Some tasks lend themselves to committees or task forces. For example, a committee or task force can screen referrals or address a system barrier. When formed, these groups should have clear expectations and leaders.

Individual Assignments: Individual CRCG members may perform specific functions. Short-term, simple assignments can be used to draw in CRCG members on the periphery.

<u>Accountability</u>: To maintain accountability, follow up on the status of the assignment at times and intervals appropriate to the task. If an assignment is not being done or is behind schedule, the Chair and CRCG should explore, with the responsible party(s), ways to complete the assignment by deadline.

Celebrate

It is very important to frequently acknowledge, praise, and thank the contributions of the members. Affirming the contributions of the members lets them know they are making a difference and that they are valued.

Consider having an annual or special gathering to celebrate CRCG accomplishments and contributions of the members, the member organizations, and agencies. This can be a potluck, luncheon, or a "pay-your-own-way" dinner at a restaurant. Awards, elaborate or simple, may be given to recognize contributions to the CRCG.

Problem Solving

The things we fear most in organizations -- fluctuations, disturbances,
imbalances -- are the primary source of creativity.

Margaret J. Wheatley

Conflicts within the CRCG

Conflict can be difficult. However, if properly managed, conflict can be a
great source of creativity, innovation, and team building. Operating by
consensus might avoid unnecessary splintering of the CRCG. While voting
might divide the CRCG, in consensus, all have to come to agreement.

If a conflict does emerge, address it and discuss the issues. Working towards
a resolution can result in creative approaches that were not previously
considered. If the issue is especially heightened or if you are seen as aligned
with one side or the other, it might be useful to bring in a neutral facilitator
to facilitate the discussion.

Conflicts Between Members

Conflicts might emerge
between members regarding
agency programs or policies.
If the issue is irresolvable by
the members or threatens the
stability and effectiveness of
the CRCG, the issue can be
turned over to mediators to
resolve.

Non-member mediators may
help the group to come to
consensus. Review the MOU
for more information
regarding mediators.

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"Thank you for calling Creative Business Seminars.
If you'd like to become a more creative problem solver,
press 1 without touching any part of your telephone."

Role Confusion

It is important to keep the responsibilities of each leadership role clear. For example, the roles and responsibilities of the Chair and Coordinator are similar and are sometimes confused. The Coordinator is not a member of the CRCG but serves as its staff. The Chair remains the chief elected officer of the CRCG and will provide guidance and supervision to the Coordinator on behalf of the CRCG.

CRCG members will be responsive to the critical needs identified by the Coordinator. The Chair and Coordinator should collaborate closely as policy and staff leaders of the CRCG. If role confusion becomes an issue, address it with the entire CRCG. Consider writing out specific job responsibilities of each leadership position.

Members with Insufficient Authority

All CRCG members must be able to commit resources from their agency to an ISP at the staffing. If a member is unable to commit agency resources, discuss the issue with the member and get his/her suggestions for solving the problem. This might mean educating the member's supervisor so that more authority can be granted, or it might mean finding a different person from that agency or organization.

Mention frequently the importance of members having the authority to commit resources of their agency or organization to the service plans developed for individuals. Remind members of the likelihood that individuals and families have been put off numerous times when seeking services, and that the CRCG is committed to having a service plan in place by the end of the staffing. Members without sufficient authority might realize they need to get additional authority or that another representative from their agency or organization might be more appropriate.

Poor Participation

A CRCG functions optimally with full participation from its members. When participation is poor, there are fewer referrals and incomplete ISPs. Full member participation is defined as attending meetings, providing services to individuals and families, making referrals, serving as lead agency when appropriate, and assisting with the tasks of operating the CRCG.
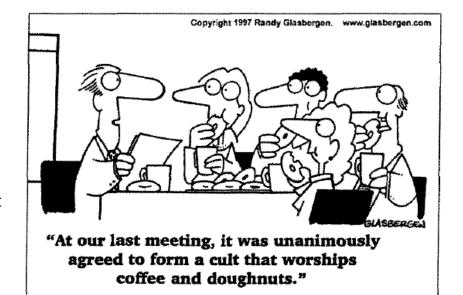
Low Attendance

There are many reasons that members either do not attend meetings or attend consistently. Often, members perceive the benefits of participating too small relative to the cost. CRCG members have many time demands and must decide what to engage in and what to forgo.

To strengthen attendance, consider the following strategies:

<u>Use effective communication to prevent scheduling conflicts</u>

- Provide meeting reminders.

- Personally ask members to attend. A member is more likely to say "yes" if personally asked to attend and understand why they are important.

- Call members with poor attendance to inquire about possible obstacles to participation.

<u>Emphasize the value of member attendance</u>

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"At our last meeting, it was unanimously agreed to form a cult that worships coffee and doughnuts."

- Develop "talking points" to discuss the benefits of the CRCG to members and others.

- Provide support to members by educating their supervisors about the CRCG and its value to their agency.

- Ensure members have relevant literature about the CRCG and what it accomplishes.

<u>Make meeting attendance more attractive to members</u>

- Be sure CRCG meetings are worth attending by having at least one person or family for whom you develop an ISP at each meeting.

- Have an interesting and engaging guest speaker who can present material of interest to your CRCG.

- Consider including food in the meeting. For example, box lunches, or coffee and donuts.

If poor attendance becomes a problem, call a special meeting of the CRCG to discuss the issue and develop solutions. Consider getting a neutral facilitator to lead the conversation. If your efforts to involve representatives from the MOU state agencies are unsuccessful, call the State CRCG Office and staff will connect with the state agencies to address the situation.

Too Few Referrals

The mission of the CRCG is to create ISPs for individuals and families. ISPs are created when a referral is made and a staffing is conducted. Members should submit referrals to the CRCG. The number of referrals vary by CRCG.

For example, some CRCGs receive one referral per quarter while others receive ten per month. The State CRCG Office recommends that local CRCGs strive to serve at least two people or families per month.

To mitigate limited referrals, rotate responsibility for generating referrals among your members. Each member might agree to refer an individual or family on a given month.

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"The trouble with this company is nobody wants to accept responsibility for anything. But don't tell anyone I said that!"

Consider reviewing the screening criteria. Members might feel that referrals will get "kicked back" because of narrow eligibility requirements. A decision to revise the criteria should be made by the entire CRCG. For more information on eligibility requirements, visit the [CRCG website](#) for the Referral Eligibility Chart.

Lastly, consider expanding the population(s) referred to the CRCG. The CRCG may establish referral mechanisms for new populations to be served by a CRCG.

If low referral rates continue to be a concern, call a special meeting of the CRCG to discuss the problem and develop solutions or contact the State CRCG Office for support.

Incomplete Service Plans

The power of the CRCG rests with the willingness of the members to commit their time, attention, and resources to its success. The CRCG has little to recommend to the individual or family if members cannot commit resources. Consider the following suggestions to ensure successful commitments by members:

- Call upon specific members and ask if they provide a needed service and, if so, ask what it would take for an individual or family to get that service from their agency.

- Prior to an ISP meeting, talk to members whose services might be needed as indicated in the referral documents. Those members can come to the meeting prepared to commit to the provision of service(s).

- Talk one-on-one to members reluctant to commit resources to determine the reason and possible solutions.

Poor Follow Through on Service Plans

The development and implementation of comprehensive ISPs is the focus of the CRCG. If follow through is not happening, find out what is happening by asking questions such as:

- "Is this situational or a pattern?"

- "Is the lead entity dropping the ball?"

- "Have the agencies who made commitments put this ISP on a 'back burner?'"

- "Are individuals/families abandoning the plan?"

If poor follow through is a pattern, address it with the entire CRCG. Lay out the issue at a CRCG meeting and invite members to discuss barriers to implementing the ISPs. The Chair or facilitator is responsible for keeping the discussion focused with respect to all parties. "Fix the problem, not the blame."

If poor follow through is occasional, address it on a case by case basis. Talk with involved parties and help them find ways to remove barriers.

> **Don't fix the blame, fix the problem.**
> *Japanese Proverb*

Conclusion

In a gentle way, you can shake the world.
Mahatma Gandhi

You are embarking on an exciting, challenging endeavor. Thank you for embracing this opportunity to make a meaningful difference and enrich the lives of people in your community, and your community as a whole.

Please know you are not alone. Your fellow CRCG Chairs in other Texas communities have a wealth of wisdom to share based on years of experiences. Your local CRCG members can be a source of strength by providing ongoing support, insight, and encouragement.

Last but not least, the State CRCG Office is committed to serving you and your CRCG. Please reach out for assistance and access our resources including:

- The CRCG website at https://crcg.hhs.texas.gov.

- Tools and materials to support and strengthen your CRCG

For more information and technical assistance, please contact:

State CRCG Office
6330 E. Highway 290, Suite 300
Austin, TX 78723
Phone: 512-206-5255
E-mail: crcg@hhsc.state.tx.us
Website: https://crcg.hhs.texas.gov

Community Resource Coordination Groups is a collaborative process serving the children and youth, families, and adults of Texas in partnership with:

Individuals and Families

Caregivers

Texas Health and Human Service Commission

Texas Department of Family and Protective Services

Texas Department of State Health Services

Texas Department of Criminal Justice - Texas Correctional Office on Offenders with Medical or Mental Impairments

Texas Juvenile Justice Department

Texas Department of Housing and Community Affairs

Texas Education Agency

Texas Workforce Commission

Private Providers

State CRCG Office

6330 E. Highway 290, Suite 300
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Website: https://crcg.hhs.texas.gov